

STATE UNIVERSITY

This is a sample primary letter from a university, in which it is presumed that the recipient is an existing gift annuitant. You'll want to include text that supports your specific mission; PG Calc can help develop content for your solicitation for an additional fee. This sample letter is intended simply to illustrate some of the variables that can be drawn from the BatchCalcs file (shown in bold).

The pages that follow show three letters generated by merging this primary letter with sample data in the BatchCalcs file. Notice how the values in the third paragraph change from letter to letter.

<<Address Block>>

Dear <<Salutation>>,

Thank you for your past support of the work we do at <<Charity_Name>>.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2009 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the <<Charity_Name>>.

If you were to create another gift annuity this year with <<Amount>> in cash, you will receive a charitable income tax deduction of approximately <<Deduction>> and annual payments of <<Annual_Payment>> for the rest of your life. What's more, <<Taxfree_income>> of the payments you receive each year will be tax-free during the first <<Expected_return_years>> years.

You can also establish a gift annuity with publicly-trade securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with <<Charity_Name>>, or have any questions about how you can support our work, please call me at 888-497-4970 or email me at jsabella@pgcalc.com.

Thank you again for your generous support of <<Charity_Name>>.

Sincerely,

Joe Sabella



129 Mount Auburn Street
Cambridge, MA 02138
USA

PHONE (888) 497-4970
FAX (888) 497-4974
EMAIL info@pgcalc.com
WEBSITE <http://www.pgcalc.com>

STATE UNIVERSITY

This is a sample primary letter from a university that illustrates some of the variables that can be drawn from the BatchCalcs file.

This letter shows the benefits of a \$10,000 gift annuity from an individual with certain personal parameters, with merged data from a BatchCalcs file.

John Annuitant
121 Elm Street
Omaha, NE 68103

Dear John,

Thank you for your past support of the work we do at State University.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2009 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the State University.

If you were to create another gift annuity this year with \$10,000 in cash, you will receive a charitable income tax deduction of approximately \$5,000.12 and annual payments of \$800.00 for the rest of your life. What's more, \$300.00 of the payments you receive each year will be tax-free during the first 7.8 years.

You can also establish a gift annuity with publicly-trade securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 888-497-4970 or email me at jsabella@pgcalc.com.

Thank you again for your generous support of State University.

Sincerely,

Joe Sabella



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This is a sample primary letter from a university that illustrates some of the variables that can be drawn from the BatchCalcs file.

This letter shows the benefits of a \$10,000 gift annuity from an individual with different personal parameters, with merged data from a BatchCalcs file.

John Annuitant
121 Elm Street
Omaha, NE 68103

Dear John,

Thank you for your past support of the work we do at State University.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2009 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the State University.

If you were to create another gift annuity this year with \$10,000 in cash, you will receive a charitable income tax deduction of approximately \$6,000.15 and annual payments of \$740.00 for the rest of your life. What's more, \$260.00 of the payments you receive each year will be tax-free during the first 10.1 years.

You can also establish a gift annuity with publicly-trade securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 888-497-4970 or email me at jsabella@pgcalc.com.

Thank you again for your generous support of State University.

Sincerely,

Joe Sabella



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This is a sample primary letter from a university that illustrates some of the variables that can be drawn from the BatchCalcs file.

This letter shows the benefits of a \$50,000 gift annuity from an individual with certain personal parameters, with merged data from a BatchCalcs file.

John Annuitant
121 Elm Street
Omaha, NE 68103

Dear John,

Thank you for your past support of the work we do at State University.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2009 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the State University.

If you were to create another gift annuity this year with \$50,000.00 in cash, you will receive a charitable income tax deduction of approximately \$32,353.50 and annual payments of \$5,650.00 for the rest of your life. What's more, \$4,412.65 of the payments you receive each year will be tax-free during the first 4 years.

You can also establish a gift annuity with publicly-trade securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with State University or have any questions about how you can support our work, please call me at 888-497-4970 or email me at jsabella@pgcalc.com.

Thank you again for your generous support of State University.

Sincerely,

Joe Sabella



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